

Increasing Access to Decision-Making Support for Older Adults

Collaborating agencies:

SSA, HHS (CMS, ACL), CFPB

Foundation:

[Discovery Research & Life Experience Charter](#)

Project Summary

The project will facilitate a community stakeholder-centered design process to build and test an information and outreach model to help older adults make informed retirement and healthcare decisions through connections to trusted community-based resources.

Customer pain point:

Many older adults, particularly those with lower incomes or who continue to work into older age to cover their expenses, have difficulty finding objective decision-making support resources to help them understand and navigate the interconnections between retirement benefits options, their financial situations, and their health outlooks.

Project Objectives

The project aims to increase the accessibility and availability of holistic resources at existing touchpoints (such as community-based organizations); raise awareness about local resources; and reduce the burden on older adults as they are making retirement and healthcare decisions. As a result, individuals will more easily determine the correct steps for their situations.

Target milestones in 2023 include:

- Conduct a prioritization workshop with community stakeholders, including older adults in underserved communities, to determine key areas for improvement
- Develop a design and evaluation plan to determine the long-term effectiveness of connecting older adults with retirement resources
- Conduct intervention testing of a model
- Assess results and develop a recommendation for scaling the model intervention for a pilot

Primary deliverables in 2023 include:

- Concept prototype
- Implementation plan for increasing access to decision-making support for older adults in underserved communities
- Summary of findings from the intervention pilots
- Operations plan proposal for expanding the intervention, including recommendations to agencies on eliminating redundancies or improving existing content

Measures of Success

Key outcomes:

The project's success is defined by its ability to reduce customer navigation burden and duplicative processes, connect older adults to streamlined information available across a variety of Federal agencies and programs, and improve the ability of older adults to make informed choices that work for them.

Design phase project measures:

- Reduction and streamlining of existing content, including new support touchpoints that offer financial resources and information in tandem with health and/or retirement benefits support
- Older adults who use the prototype have increased confidence in their retirement and healthcare (including Medicare) choices, and find the decision-making supports clear and useful
- Improve experience measures such as trust and satisfaction in sample populations compared to people not using the supports